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Global and China Touch Screen (Panel)Industry Report, 2014-2015

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Abstracts

The report covers the followings:

1. Development trends of touch screen technology
2. Trends of touch screen market
3. Analysis on the touch screen industry
4. Study on 22 major touch screen vendors
5. Research on 5 touch screen glass vendors

The core of the touch screen market is reflected in smartphones and Tablet PCs, both of which will be in trouble in the next three years. The smartphone market has obviously been saturated and slowed down. China exceeds the United States to see the highest smartphone penetration rate. However, the Chinese smartphone market where a person often holds two smartphones is the first one that suffers recession in the world. From January to October of 2014, China's smartphone shipment dropped down 10.4% year on year to 312 million. China's sluggish economy is also a reason for the decline.

The Tablet PC market witnesses saturation as well. Impacted by bigger and bigger mobile phone screens, the market of Tablet PCs featured with simple functions stopped growth to descend in 2014. In terms of willingness-to-buy, adults would like to buy Tablet PCs for children, marking low replacement frequency. In the next few years, the Tablet PC market will be in a mild recession, which even can not be reversed by Apple’s upcoming 12.9-inch Tablet PCs.

Touch laptops may disappear completely, especially clamshell ones which are mainly used in offices with meaningless touch function. 2in1 laptops are inferior to clamshell laptops in performance, but are much expensive than Tablet PCs and clamshell laptops,

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so the 2in1 laptop market will shrink.

For Out-Cell touch screen vendors, In-Cell and On-Cell threaten their market, the downstream market halted, and the Out-Cell touch screen capacity is excess dramatically. In 2014, the Out-Cell touch screen market witnessed a fierce price war, the market size shrunk by 16.2%, especially South Korean and Taiwanese vendors suffered the hugest losses and some of them lost the revenue by 50%, let alone bankrupt small vendors.

Wintek (annual revenue: more than USD2 billion) and Digitech Systems (annual revenue: over USD200 million) were also listed in the considerable collapsed Out-Cell touch screen vendors in 2014. In 2015, the Out-Cell touch screen market will still see significant oversupply, particularly the field of touch screens used for Tablet PCs and laptops; meanwhile, the market will decline by 10.3%.

In-Cell and On-Cell vendors will triumph. Their price disadvantage will gradually vanish with more mature technology and high output. 50% of touch screens will adopt In-Cell or On-Cell in 2016, much higher than 31% in 2014.

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